



## Developing Your Membership

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A strong membership program can be your organization's strongest asset. Members' financial contributions are an important source of "unrestricted funds" (i.e. funds that are not earmarked for a particular project) that can support your organization's general operating costs. In addition to helping diversify your funding base and grow less dependent on foundation or government grants, a growing membership also translates into increased political clout, increasing your organization's opportunities to effect change for the benefit of your watershed. Increasing your membership will require some upfront investment of staff or volunteer time, services and equipment required to recruit and maintain new members and manage membership information. There are many resources available to help you with these tasks. We hope this guide will serve as an introduction to the basics of building your membership, and help you get started establishing or strengthening your organization's membership program.

### Setting Membership Goals

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Before spending a lot of time or energy trying to recruit new members, set some goals for your membership program. These can be outlined in an annual fundraising plan. Determine your goals for the number of new members you will acquire, and the number of current members that will renew their membership. Identify the steps the organization will take to reach each of these goals, the person(s) who will be responsible for each activity, a timeline for each activity, and the money each activity will generate and cost.

In establishing these goals, determine not only the number of members you will acquire or renew, but also the *kinds* of members you need to achieve your goals, considering geography, ethnicity, gender, member interests, etc. For example, is there a portion of your watershed that is currently underrepresented in your organization? Would it benefit your conservation work to increase the representation of anglers, riparian landowners or water sport enthusiasts in your membership? Asking yourself these sorts of questions will help you identify the actions that will make your member recruitment efforts most effective.

### Recruiting New Members

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#### WAYS TO RECRUIT NEW MEMBERS

- Direct Appeals (see following page).
- Small, more targeted mailings of personalized letters to smaller lists of individuals likely to be interested in your group.
- Hold recruitment events - e.g. house parties, river rallies, educational workshops, field trips.
- Informational booths at events - Having a booth at an event likely to be attended by folks interested in your mission will help increase your visibility and recruit new members.
- If you hold field trips, workshops, or other "registration required" events, build a membership incentive into the registration cost. For example, set non-member registration at a price higher than the combined cost of registering as a member and becoming a member.

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- If your organization offers guided canoe trips, educational field trips or other such special events, make one or two events a free *For Members Only* membership benefit. These will provide an incentive for others to join.
- Speakers Bureau – Develop and market a speakers bureau to increase your visibility and introduce your programs to the communities in your watershed. Put together a slide show that tells your story eloquently, and include a membership pitch in every presentation.
- Board member recruitment – Set a realistic goal for the number of new members each Board member should try to recruit per month.
- Include membership information in your newsletter, and leave extra copies in local fishing equipment stores, coffee shops, diners, etc. Write the words “Complimentary Copy: We hope you will consider becoming a member today” on them.
- Offer a holiday gift membership packet that includes a gift, or a limited-time membership premium, such as a raffle ticket or a sticker.

## Direct Appeals – A Tool For Your Organization?

Direct appeals, also known as direct mail membership acquisition, describes the process of soliciting new members by doing large “Dear Friend” mailings to lists of names that you have purchased, rented or traded for your own. Lists may come from various sources, including other organizations, businesses and journals with a client base that has a high likelihood to be interested in your organization. There are differing opinions on the efficiency of using direct mail to recruit new members. Some fundraising professionals have suggested that large direct appeal campaigns are best suited to larger groups that have the means, staff resources and opportunities to benefit from them. The following considerations were adapted from a set of Point/Counterpoint articles written by Andy Robinson and Amy O’Connor on the direct appeal debate (*Grassroots Fundraising Journal*, Vol. 17, no. 6.)

### Direct Appeals – PROS

- **Long-term gain** – Although special appeals have a low rate of success initially (1-2%), the long term opportunity for increased donations and renewed memberships is great once individuals become members. Direct appeals are not recommended for groups not interested in upgrading members’ financial contributions beyond the initial membership level.
- **More diverse membership** – Special appeals is one way to increase your membership from a more diverse pool of prospects, reaching outside your “inner circle.”
- **Flexibility** – Direct appeal mailings need not mean sending out thousands of letters. You can scale back your direct appeal mailing depending on the number of members you would like to recruit.
- **Not just about recruiting members** – Direct appeals will also help increase your organization’s visibility, help you identify potential volunteers and publicize new initiatives.

### Direct Appeals – CONS

- **Expense** – Direct appeals can be expensive on the front end, due to costs of buying lists, paying postage and in terms of staff/volunteer time.
- **Low Rate of Success** – The average rate of success of direct appeals is 1%. Lists of local names can be more successful (2-10%), but may be too small to help you attain your desired level of growth.
- **Slow results** – Using direct mail to increase your membership is a slow process and will not alleviate immediate financial difficulties.
- **Tracking** – To be successful in the long-term with direct mailing, it is essential to track and analyze the success rates of your lists and of the various elements of your mail package. This takes time and effort.
- **Environmental impact** – Doing mass mailings carries a significant environmental cost, when you consider that over 95% of the letters sent yield no results.

## Potential Mailing Lists

(from *River Fundraising Alert*, Vol. 4, No. 3)

- Former members who have not renewed.
- Names suggested by current members, board, or staff
- Sign-up lists at events - Be sure to have a sign-up sheet asking for names and addresses at all conferences, workshops, hearings, and other events that your organization sponsors.
- Names of buyers of raffle tickets
- Names of people requesting information - Be sure that anyone calling for information about your group or your issues gets added to your in-house list.
- Lists of local recreational clubs – Local canoeing, kayaking, and fishing clubs have a vested interest in keeping rivers natural and free-flowing. Find a friend who belongs and see if the club will either share its list or do a mailing for you.
- Lists of local organizations similar to yours, including area lake associations
- Landowner lists – These names can be procured by reviewing land ownership in plat maps, while addresses can be located through tax records available through the county court house.
- Mailing lists of political candidates. Is there a local or state political figure that supports your issues? Try buying/exchanging mailing lists with him/her.
- Names in state and local government. The files of the secretary of state, the registrar of voters, or local clerk and recorder offices can be gold mines for direct mail. Look for lists of registered voters, contributors to progressive political candidates, circulators of initiative petitions on relevant issues, etc.
- Lists of citizens commenting on specific issues. Names and addresses of folks commenting on a particular issue are on file with the respective state or federal agency. Such lists can usually be obtained by writing to the agency and requesting a copy.
- Local or regional portions of lists from organizations with similar goals, such as American Rivers, River Network, River Alliance of Wisconsin, Trout Unlimited, and American Canoe Association.

## Direct Appeals – The Package

(adapted from *Nuts and Bolts of Direct Mail* by Amy O'Connor, *River Fundraising Alert*, Vol. 4, No. 4)

Entire books have been written on the different elements of a direct appeal package, discussing a range of issues from the length of the letter to the type of envelope you should use. If your organization chooses to undertake a direct appeal campaign, we encourage you to read more about this topic, experiment with the different elements of the package, and keep track of what is most successful. (see page A.2.8 for sample letter)

### Outside Envelope

- ✓ Hand addressing the envelope is the most effective way to personalize the mailing, although not practical for large mailings.
- ✓ You can add a message on the envelope to convey a sense of urgency or pique the recipient's interest.

### The Letter

- ✓ Use letterhead that includes Board members' names.
- ✓ Make it as long a letter as you need to make your case (2-4 pages) Nonetheless, remember that most people will only read the first and last paragraphs, and the P.S.
- ✓ Basic elements of the letter usually include the request (i.e. what are you asking them to do?); what's at stake (i.e. what is the current situation with the river or watershed?); the need (i.e. what is the specific threat to the river?); the response (i.e. what is your group going to do about the threat?); membership benefits (e.g. newsletter, action alerts, invitations to events, etc.); the P.S. (e.g. a compelling reason why they should respond quickly, a premium, etc.)
- ✓ Use a personal tone that focuses on "you" (the reader), instead of "we" (the organization.)

## A Series of Helpful Tools for River and Watershed Advocates – Membership

- ✓ Write short sentences using standard American English and highlight important points by use of underlining or bold face type. Avoid using acronyms.
- ✓ If you know the addressee personally, handwrite a short, personal note to the letter.

### Personalized Reply Form

- ✓ Make it easy to read, and size it so that it will fit easily into the return envelope.
- ✓ Assume the reply form will be separated from the letter. Include language such as: “Yes! I want to join (your organization.) Enclosed is my membership contribution of \$\_\_\_\_\_.”
- ✓ Follow the acceptance statement with several potential gift amounts alongside check-off boxes.
- ✓ Restate the tangible benefits of membership.
- ✓ Code the reply forms to track the mailing to which the individual is responding. Track the success rate of the lists used

### Reply Envelope

- ✓ Clearly print your address on the envelope.
- ✓ You can include postage on the return envelope, although it is not necessary that you do.

## Direct Appeals –Tracking the Appeal

For all appeals, you will want to track the cost of the appeal, how much it brought in, and the percentage of responses received. As you experiment using different lists, you will want to know which lists perform better in recruiting new members, so you can continue to use them in future appeals. Before sending an appeal to a large list of names, test it on a subset of names to gauge its likelihood of success. Other things you may want to experiment with and track include the design, type and look of the outer envelope, the letter, and the cost of membership.

## Recruiting New Members – Building Business Memberships

Building a solid membership of businesses – from the small, local shops to the large corporations – can strengthen an organization in many ways. Financially, business memberships generally have a higher “profit margin” than individual memberships, since a smaller percentage of each membership dollar needs to be returned in the form of “services” (e.g. newsletters, field trips, etc.). A strong business membership will also help you gain “local credibility” and access to people of power and influence in the community. The contacts developed through your business members can also help you identify potential nominees for your Board of directors. **Note:** To avoid conflict, we recommend setting a formal policy on business memberships outlining issues such as the circumstances under which businesses can/cannot become members, the power granted to them, etc.

### Steps to Building a Business Membership Program

(adapted from *Building Business Memberships in River and Watershed Organizations* by Don Elder;  
River Fundraising Alert, Vol. 3, No. 1)

- Develop the prospect list – Involve Board members, volunteers and staff in identifying good business prospects and collecting contact information for each.
- Make a plan – Determine a target “ask” figure for each business and set a timeline for approaching them.
- Form a committee – Recruit board members who are familiar with the business community or have experience asking for money to do the asking.
- Prepare materials – Write a short and concise “case statement” describing your mission, major accomplishments and future goals. You can also make a small photo album documenting your work.
- Get an appointment – Write a letter, make a call, or follow a letter with a personal phone call to request an appointment.
- Prepare for the visit – Learn all that you can about the business prior to the visit, and develop a case for why they should support your organization. Decide who in your party will play each role – who will break the ice? Describe the mission? Your current projects? Who will make the ask for financial support?
- Make the visit – Be on time and ready to make your case quickly, if your prospect is pressed for time. After a brief introductory period and small talk, move into the business of the meeting and move steadily through your major points. Make the request, sit back and *calmly wait*. You will likely get neither a “no” nor a “yes.” Be ready with some important follow-up points, and offer to answer any questions. Be the one to conclude the meeting.
- Follow up – Write a note within one or two days, thanking the person for his/her time, reiterating your request, and including any relevant information. If you haven’t heard back in a couple of weeks, you can follow up with another phone call, leaving a message for your contact.

## Membership Renewals

The key to growing your organization involves not only recruiting new members, but also *keeping them*. Renewal rates will vary from one organization to the next, but are usually in the 40-70% range for individual members, and up to 80-90% for business members.

### SAMPLE RENEWAL SYSTEM

- Provide members with various opportunities to renew their membership. For example, send them a letter. If they do not respond, send a second, slightly different letter. Then send a third, more urgent, letter. Follow these with a phone call.
- Do renewals every 2 or three months. For example, under a quarterly system, send a first letter to members whose membership expires January-March on January 5<sup>th</sup>. After one month, send a second letter to all who haven't replied, and continue with the "3-letter-one-call" series. On April 5<sup>th</sup>, begin the renewal process for memberships expiring April-June.
- Letters can be short, explaining that their membership is coming to an end, describing what their dues help accomplish, outlining the benefits of membership, and thanking them for their past support.
- Include a response card and a reply envelope with each letter.
- For "major donors" (i.e. those who give beyond a certain dollar amount), personalize the letter.
- Once members renew, thank them promptly.
- Do not automatically discard from your database the names of members who have not renewed. Send them a renewal mailing annually for a couple of years.

A strong retention program begins by making members feel that being a member of your organization is worth their while. Keep your membership informed about your work on a regular basis by sending them newsletters and sending them tidbits of information from time to time. These may include copies of a newspaper article highlighting your organization, a word from the board president on a recent accomplishment or details about a new project.

Recognize your members publicly and regularly to let them know their support is important to the organization. Print a list of all new members in your newsletter. Recognize the contributions of your business membership in your brochure, or special event programs. Hold special events for your members, and invite them to all events open to the public.

And just as importantly, establish a system to remind your current members to renew their membership.

## Managing the Membership Data

The first step in putting together a membership database is to understand what users want to be able to do with it (e.g. pull together a list of all members from a particular township, a phone list of everyone who has volunteered in the last year, a report that identifies people who donated money in the last quarter, a list of all city and county officials, etc.). Based on how you want to use the database, you will create and add fields to track information about people in your database. Some things to consider:

### **DATABASE TIPS**

(adapted from *Customer Database Principles* by Jayne Cravens; Coyote Communications)

**Limit the Number of Databases You Create** – Although you may find that you need a separate database to track your accounting or your projects, all information relating to members, volunteers, and donors should be kept in a single database. This results in a more efficient system that is easier to cross reference.

**Capture Everyone** – You want your database to GROW. Input the names of anyone who calls you for information, attends an event, buys a raffle ticket, or otherwise interacts with your organization. These people have already shown an interest in your group, and are your best prospects for attending future events, volunteering, donating, etc. Develop a system to ensure that everyone in the organization contributes information to be added or changed in the database.

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**Who's in Charge** – Ideally, only one person in your organization will be responsible for inputting, changing or deleting information in the database, to cut down on duplicate records and confusion. If more than one person is inputting information, create a category to track who input what.

**Universal Access** – Although one person may be in charge of the database, everyone in your organization should have at least limited access to it (looking up phone numbers, generating and printing reports, etc.).

**The Information Needed Most** – While setting up your database, try to anticipate all current and future information needs. Be consistent in the abbreviations, font, and format you use to enter data. Here are some basic, general suggestions for information categories for a membership database:

|                                  |  |                 |
|----------------------------------|--|-----------------|
| first name                       | last name                                    | salutation      |
| name tag first name              | mailing address (use zip + 4 format)         | day phone       |
| evening phone                    | fax number                                   | e-mail address  |
| date entered into system         | date information was last updated            | referred by     |
| affiliation/organization         | contributions (include date given)           | events attended |
| <i>Do not send mail</i> category | personal interests (fishing, canoeing, etc.) |                 |

**Be Able to Sort Information** – Your database should allow you to sort and view information in a variety of ways. For instance, you might want to generate:

- An alphabetical list of people who attended your Fall fund raiser;
- Personalized letters to donors who have contributed more than \$100;
- Mailing labels for a particular city or county, sorted by zip code; or
- A phone list of people interested in a specific activity by your organization

**Frequently Update** – Review your database periodically to make sure information is correct. Ask well-connected board members or community leaders to review a portion of it to make sure everyone who should be on it is.

**Design it in-House** – If at all possible, have your computerized database designed in-house by the person who is going to be using it most frequently. If you use an outside consultant to design it, make sure someone in your organization is trained so that you can alter the database design and structure as you need.

**Security** – If many different people will have access to your database, you may wish to have security passwords for different levels of use (e.g. one for inputting information, one for designing screens, one for viewing confidential information, etc.). This ensures confidentiality as needed, and prevents accidental deletions or changes of data.

**Backup Your Information** – If your database is computerized, backup the database OFTEN (at least once a week). Keep these backup copies in a safe place.

**Removing Someone from the Database** – In most cases, you should never remove someone from your database, even if that person requests it; instead, create a category that notes people who do not want to be contacted. This is the best way to ensure that someone else does not add the name at a later date. However, regularly remove duplicate records from your database, as well as people who have moved outside of the area, are deceased, or have had a bad address in your system for over a year.

### Additional Resources

- **CompuMentor** is a nonprofit, technology assistance agency that provides low cost software packages (some of which include database programs) for nonprofit organizations. Call (800) 659-3579 or visit [www.compumentor.org](http://www.compumentor.org).
- **Coyote Communications** offers various helpful online tip sheets on technology topics, including what to look for in database design and software. Visit [www.coyotecom.com](http://www.coyotecom.com)
- **Direct Mail on a Shoestring**, by Bruce Ballender. The NRAG Papers, Vo. 4, No. 4, Spring 1984. Available through the Western Organization of Resource Councils. Call (406) 252-9672.
- **Ebase™** is a free interactive database for nonprofit organizations. Visit [www.ebase.org](http://www.ebase.org) and [www.techrocks.org](http://www.techrocks.org) for information and support.
- The **Environmental Support Center** offers low interest loans to help environmental nonprofits increase, diversify and stabilize their sources of financial support, including for seed funding for membership development and direct mail campaigns. Call (202) 331-9700 or visit [www.envsc.org](http://www.envsc.org).
- **Fundraising for Social Change**, by Kim Klein. Available through Chardon Press. Call (888) 458-8588 or visit [www.chardonpress.com](http://www.chardonpress.com).
- The **Grassroots Fundraising Journal** has published numerous articles on aspects membership development, including articles on the use of direct mail, upgrading members to major donors, and database management. To subscribe or order back issues, contact Chardon Press. Call (888) 458-8588; or visit [www.chardonpress.com](http://www.chardonpress.com).
- **Nonprofit Standard Mail Eligibility**, Publication #417 of the United States Postal Service, discusses eligibility, authorization and mailing rules for nonprofit mailing rates. Copies available at all post offices, or by visiting <http://pe.usps.gov/text/pub417/welcome.htm>.
- **River Fundraising Alert**, a newsletter for River Network Partners, includes many articles on various aspects of fundraising, including membership management. Call (800) 423-6747 or visit [www.rivernetnetwork.org](http://www.rivernetnetwork.org).
- The **River Protection Grant Program**, administered by the Wisconsin DNR, provides financial assistance to local watershed organizations for organizational development needs, including membership development. Contact the Environmental Grants Specialist at your local DNR office, or visit [www.dnr.state.wi.us/org/water/fhp/rivers/index.htm](http://www.dnr.state.wi.us/org/water/fhp/rivers/index.htm)
- **TechSoup**, an online source of technology information for non-profits, offers discounted software, information, technology recommendations, and message boards on a wide range of topics, including databases, hiring technology consultants, and raising funds over the web. Call (415) 512-7784 or visit [www.techsoup.org](http://www.techsoup.org).



### Sample Member Appeal Letter

A sample membership appeal letter follows. As noted on page 3, these letters may be 2-4 pages long, or longer. Following is a condensed example of a River Alliance appeal letter.



306 E. Wilson St. 2W  
Madison, WI 53703  
608-257-2424  
[www.wisconsinrivers.org](http://www.wisconsinrivers.org)

**“In the short time it has been around,  
the River Alliance has earned a reputation as  
a strong and credible voice for river protection.”**  
--Former Wisconsin Governor and U.S. Senator, Gaylord Nelson

**Board of  
Directors**

Joe Aliota  
DeForest

Bill Berry  
Stevens Point

Scott Froehlke  
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Waupaca

Rebecca Power  
Amherst  
Junction

George Rock  
White Lake

Melissa  
Scanlan  
Madison

Bill Schultheis  
Dousman

Dear Friend,

We hope that you take a look at what we have accomplished and consider joining our growing list of members. Enclosed, please find our last two newsletters, fact sheets on our programs, and a window decal. Member support allows us to continue protecting and restoring Wisconsin’s rivers, streams and watersheds.

**Since 2001 we have:**

- **Battled for stronger state rules to control polluted runoff** -- This pollution is the number one threat to water quality in Wisconsin. We are advocating for rules that will require better farming practices, and supporting proposals to curb construction site erosion and stormwater damage.
- **Successfully convinced Governor Scott McCallum to veto the proposed split of Wisconsin’s DNR**—With a coalition of groups, the River Alliance stopped a proposed budget item that would needlessly create a separate department of forestry and endanger our rivers, and wetlands.
- **Created the Watershed Advocates Toolkit for river protection** to help create and build local grassroots organizations that will fight for our rivers and watersheds.
- **Co-hosted a statewide conference *Celebrating Community-based Conservation*** -- Packed with enthusiasm, this conference, hosted with Gathering Waters, brought together many different conservation groups and individuals for learning, sharing, networking, and discussion.
- **Produced the first-in-the-nation dam removal guide and video.** Created with Trout Unlimited, this “toolkit” gives river advocates a step-by-step process for pursuing dam removal as a river restoration tool. Over 2,500 copies have already been sold in 35 states and six countries. The Wisconsin DNR found the publication so valuable that they purchased 150 copies, and the National Park Service 75.

We are proud of our record and excited for the future.

**But we also need to be ready to respond to threats. Threats like:**

- **Excessive groundwater withdrawals that threaten surface water quantity and quality.** The effort by the Perrier Bottling Corporation to site a facility in Wisconsin has raised the larger question of groundwater withdrawals throughout this state – we are currently working to pass legislation that will protect our water sources for the 21<sup>st</sup> century.
- **A fish kill from polluted run-off that wiped out thousands of trout in Black Earth Creek,** underscoring the need for stronger rules to control polluted runoff; and,
- **An Assembly budget package that wreaks havoc on the environment and on the health of our waterways.**

**Thank you for your support. Please help us keep the momentum!** Please take a moment to return the enclosed return slip with your much-needed donation

For Wisconsin’s rivers,

Todd L. Ambs  
Executive Director

**P.S. Please look over the enclosed news pieces featuring the River Alliance. They are perfect examples of the issues we face and the favorable outcomes we generate due to your member support.**